**Honda Marysville Managers Meeting**

11/21/23

First off there is a LOT of great stuff happening. Obviously if there was not you would not be selling the vehicles and servicing the vehicles you do. The purpose of this meeting is to allow me to get a full understanding of how you currently USE the crm and what your current process is and to see what we can do to make it better. VIN solutions does a LOT of stuff, however I have found that in reality we only need it to do a few things in order to fully work correctly.

**Managers:**

* What are the functions of the CRM you like the Most?
* What do you Like the least?
* If you could change anything, what would it be?
* What is the current process when an appointment is made?
  + What is expected of the Salesperson?
    - Pullup vehicle prior to them coming in?
* What is the current process for a salesperson when checking in a customer and first greeting them?
* What is your current expectation of information being in the crm before desking a deal?

**Salespeople in general really only need to know how to do 5 Things in the system.**

1. How to get a customer in the system properly
   1. Make sure they SEARCH the Customer to find existing customers and not add duplicates. This will help increase a better experience for the customer as WELL as Identify GREAT Customers and potential trades right away.
   2. GET THE Current Vehicle they are driving into the system no matter what. Making note of what they drove up in.
   3. This also helps start dialog with the customer about what they are looking for and why. Are they down-sizing, Upgrading, is the family growing and such.
      1. NOTE: Looking at the license plate cover and knowing where the car was purchased it a GREAT way to understand the customer. If the cover is from another HONDA dealer a great question is, WHY did they not buy that one from us.
   4. Putting accurate information such as phone, email, and address is vital. Putting Bogus information is NOT OK.
      1. Do they know that they can click the Validate but when entering a customer that has no history.
2. They need to know what to look for once the customer is in the system, such as sales history, Service history, If a customer is on DNC list as well as DNE.
   1. THIS IS Vital, If they put someone in the showroom/system that is on DNC they will need to get the customer to call the dealership to help ensure compliance. THEY MUST know that they CANNOT call any customer who at one time TOLD the dealer never to call them. THIS actually over-rides the [National DNC Laws,](https://www.donotcallcompliance.com/do-not-call-laws.html) [FTC SITE](https://consumer.ftc.gov/articles/national-do-not-call-registry-faqs) which allows for 90 Days on an lead or 18 Months after a sale… $50,120 Fine here PER CALL.
      1. My Suggestion here is that on the worksheet the customer provides information and a signature that we can call them regarding this visit. Better safe than sorry.
3. How to get notes into the system and why it is so vital.
   1. NOTES help them remember what took place and where they are in the deal.
   2. NOTES help the managers know what is going on and for them to be able to help the salesperson direct the deal and next steps.
   3. NOTES help anyone involved in follow-up, makes for a much better experience for the customer and shows that the store acts as a team.
   4. THEY can also get managers involved in deals that may be a little difficult. They can SEND ALERTS and TASKS to the managers and BDC people. THEY Need to know how to do that.
4. HOW to CLOSE out tasks and when and how to create their own tasks.
   1. This prevents a lot of unneeded contact with the customer and will help them follow up when and how the customer wishes.

QUESTIONS I HAVE:

1. Whos phone number is 6141234567 (BOGUS) – It shows up on over 99 Records in the past year as the cell phone
2. 9376425000 Which is corporate honda is on over 100 records in the past year being put in the cell phone field

**THINGS That Need ATTENTION:**

* Clean up old salespeople who are no longer here and get their customers reassigned.
* Lots of overdue tasks should be cleaned up. You can get with Vin support and have them wipe them out. Basically, we know the salespeople are not going to catch up so let’s start fresh.
* The current follow up process for both sales and Internet seems a little too much to me. I would go over both of these and make sure they are realistic.
* Looks like Jeff Pister is still listed in Autotrader leads as a contact (Pull up Lead for Matt Tschirner
* We seem to be relying on email to communicate with customers a lot without phone calls going out. Far too many leads have ZERO phone call attempts.
  + Get the salespeople and BDC to pick up the phone and make sure they leave a full message.
  + One example to pull up is Kevin Crowley - (614) 561-9907 NOTE that in the caller comment it simply says “Not Sure” WTF does that even mean?